

CLAIMS

What is claimed is:

1. A method for measuring and analyzing performance data comprising:
collecting transaction data indicative of performance factors;
5 analyzing the transaction data to compute an aggregate synopsis of performance of a subject under observation;
hypothesizing the aggregate synopsis to determine at least one of a plurality of recommended actions;
applying the determined recommended actions to the subject under
10 observation; and
measuring a change in the performance of the subject under observation as a result of applying the determined recommended actions.
- 15 2. The method of claim 1 wherein measuring a change in performance further comprises repeating the collecting, analyzing, hypothesizing, and applying in an iterative manner.
- 20 3. The method of claim 1 wherein hypothesizing further comprises:
comparing the aggregate synopsis to performance scores within a predetermined performance range; and
mapping the aggregate synopsis to the plurality of recommended actions based on the predetermined performance range.
4. The method of claim 3 wherein comparing further comprises providing a set of performance standards, each of the performance standards corresponding to at least a portion of the aggregate synopsis, the performance standards for determining a ranking within the predetermined performance range.

5. The method of claim 1 wherein the subject under observation further comprises a sales employee, the sales employee having a plurality of levels and the performance standards defined for each of the plurality of levels.
- 5 6. The method of claim 4 wherein the performance standards correspond to a subset of a predetermined set of customer focused skills attained by the sales employee
- 10 7. The method of claim 4 wherein the performance standards further comprise a scaling matrix operable to scale the performance scores, the scaling matrix having scaling factors corresponding to store characteristics pertinent to the transaction data.
8. The method of claim 7 wherein the scaling factors further comprise store volume, store location, and timing.
- 15 9. The method of claim 1 further comprising setting timely performance goals corresponding to the subject under observation, and adjusting the predetermined performance range in response to the performance goals.
10. The method of claim 9 wherein setting the timely performance goals further comprises setting goals according to at least one of daily, weekly, monthly, quarterly and yearly intervals.
- 20 11. The method of claim 9 further comprising establishing a staffing profile operable to attain the timely performance goal, the staffing profile indicative of optimal staffing levels for each of the sales employee levels.

12. The method of claim 1 wherein the transaction data further comprises external legacy data, field performance data, and training data.
13. The method of claim 12 wherein the field performance data further includes data indicative of least one of sales per hour (SPH), dollars per transaction (DPT),
5 units per transaction (UPT), transactions per hour (TPH), traffic conversion percentage, customer traffic count, and periodic goals.
14. The method of claim 12 wherein the external legacy data further includes at least one of administrative data, accounting data, tax data, market research data, merchandise grouping data, human resource data, and store revenue goal data.
- 10 15. The method of claim 1 wherein the aggregate synopsis further comprises report results corresponding to quantitative data.
16. The method of claim 1 wherein the transaction data corresponds to retail stores and sales employees.
17. The method of claim 1 wherein applying the determined recommended actions
15 further comprises skill development at a sales employee level and business scenarios and strategies at a store level.
18. The method of claim 1 wherein the hypothesizing further comprises
hypothesizing business scenarios and the recommended actions comprise
strategies to improve business operations and staffing profiles for increased
20 sales.
19. The method of claim 11 wherein the staffing profile further comprises an optimal aggregation of sales employees of different skill levels.

20. A system for analyzing employee and store performance data comprising:
- a transactional data store operable to store transactional data indicative of performance of a subject under observation;
 - an analysis engine coupled to receive the transactional data from the data store, the analysis engine operable to compute an aggregate synopsis of performance from the transactional data; and
 - a hypothesizer responsive to the analysis engine and operable to determine at least one of a plurality of recommended actions from the aggregated synopsis, the recommended actions directed to improving the performance reflected in the aggregate synopsis.
21. The system of claim 20 further comprising a feedback mechanism for monitoring the recommended actions and gathering, in an iterative manner, additional transactional data indicative of an effect of the implemented recommended actions.
22. The system of claim 20 further comprising a security schema operable to provide selective access to the transactional data, selective access determined as a function of a need to know and of a user's store management role within the sales organization.
23. The system of claim 20 further comprising a learning center adapted to implement the determined recommended actions.
24. The system of claim 21 wherein the feedback mechanism is further operable to monitor an advancement cycle of a sales employee based on the gathered transactional data and management certification.

25. The system of claim 20 further comprising a plurality of transactional data systems operable to gather and generate the transactional data.
26. The system of claim 20 wherein the transactional data store further comprises a database adapted to store a plurality of normalized data records and a knowledge
5 base adapted to store aggregated data having a plurality of granularity levels.
27. The system of claim 20 wherein the analysis engine is further operable to generate a plurality of performance scores, each of the performance scores adapted to be compared to a predetermined performance range.
28. The system of claim 27 wherein the hypothesizer is further operable to receive
10 the predetermined performance range, and compare the performance scores to the predetermined performance range.
29. The system of claim 28 wherein the hypothesizer further comprises a mapper operable to determine a recommended action based on the comparing by mapping the aggregate synopsis to at least one of a plurality of the recommended
15 actions.
30. The system of claim 28 wherein the hypothesizer is further operable to determine a ranking in the performance range and map the ranking into a predetermined list of recommended actions.
- 20 31. The system of claim 20 wherein the subject under observation further comprises a sales employee having a level, wherein the level corresponds to a set of defined performance standards.

32. The system of claim 31 further comprising a predetermined set of customer-focused skills corresponding to the level of the sales employee.
33. The system of claim 20 further comprising a scaling matrix operable to scale the performance standards, the scaling matrix having scaling factors corresponding to store characteristics pertinent to the transaction data.
34. The system of claim 33 wherein the scaling factors further comprise store volume, store location, and timing.
35. The system of claim 20 further comprising timely performance goals corresponding to the subject under observation, and adjusting the predetermined performance range in response to the performance goals.
36. The system of claim 35 wherein the timely performance goals further comprises periodic intervals according to at least one of hourly, daily, weekly, monthly, quarterly and yearly intervals.
37. The system of claim 20 wherein the hypothesizer is further operable to provide output indicative of optimal staffing profiles.
38. The system of claim 20 wherein the hypothesizer further comprises an operator for manual inspection of the computed aggregate synopsis.
39. The system of claim 20 wherein the hypothesizer further comprises an expert system.
40. The system of claim 39 wherein the expert system is further operable for qualitative analysis.

41. The system of claim 20 wherein the plurality of recommended actions further correspond to a library of multimedia solutions, the multimedia solutions adapted to provide educational development of skill and knowledge.
42. The system of claim 41 wherein the multimedia solutions further comprise a
5 curricula of educational coursework materials.
43. The system of claim 41 wherein the multimedia solutions further comprise interactive and passive delivery and feedback mediums including magnetic, optical, and printed materials.
44. The system of claim 20 wherein the analysis engine is further operable to
10 compute quantitative data and the hypothesizer is operable to generate qualitative conclusions.
45. A method for gathering, transforming, analyzing, and presenting sales productivity data to generate remedial conclusions comprising:
- 15 gathering transactional data from a plurality of sources, the transactional data indicative of a level of performance of a subject under observation;
- storing the transactional data in a normalized form operable to be accessed by analytical processes;
- 20 translating the stored transactional data into an aggregated form, the aggregated form adapted to be accessed at a plurality of granularity levels;
- computing a report indicative of the performance of a subject under observation, the computing performed by invoking the stored transactional data;
- retrieving a predetermined range corresponding to the report, the predetermined range having a plurality of performance levels;
- 25 comparing the computed report to the predetermined range to determine a ranking within the predetermined range;

mapping the ranking into a predetermined list of recommended actions, the recommended actions adapted to improve the performance of the subject under observation;

5 applying the mapped recommended actions to the subject under observation; and

reevaluating the subject under observation to determine the applicability of the recommended actions.

46. The method of claim 45 wherein reevaluating further comprises remeasuring the data and recomputing the ranking.

10 47. The method of claim 46 wherein remeasuring further comprises repeating the gathering, storing, translating, computing, retrieving, and analyzing in an iterative manner.

48. The method of claim 45 wherein the subject under observation is an employee.

15 49. The method of claim 45 wherein the transaction data corresponds to a retail organization.

50. The method of claim 45 wherein the aggregated form of the transactional data is a multidimensional form operable for analysis at a variety of granularity levels.

51. The method of claim 45 wherein the performance levels include low, medium, and high.

20 52. A decision support system for gathering, transforming, and analyzing, transactional data to generate remedial conclusions comprising:

at least one transactional data system operable to collect and generate transactional data indicative of a level of performance of a subject under observation;

5 a transactional database operable to store the transactional data in a normalized form operable to be accessed by analytical processes;

a knowledge base operable to receive a translation of at least a subset of the transactional data and further operable to store the transactional data in an aggregated form, the aggregated form adapted to be accessed at a plurality of granularity levels;

10 a data analysis engine operable to compute a report indicative of the performance of a subject under observation, the computing including accessing the stored transactional data from the database and the knowledge base;

15 a statistical classifier operable to compute a predetermined range corresponding to the reports, the predetermined range having a plurality of performance levels;

a hypothesizer adapted to compare the computed report to the predetermined range to determine a ranking within the predetermined range;

20 a mapper operable to map the ranking into a predetermined list of recommended actions, the recommended actions adapted to improve the level of performance;

a learning center adapted to apply the mapped recommended actions to the subject under test; and

a feedback coupling operable to reevaluate the subject under test to determine the result of the recommended actions.

25 53. The system of claim 52 wherein the database is a relational database.

54. The system of claim 52 wherein the knowledge base is a multidimensional database operable for analytical processing.

55. The system of claim 52 wherein the reports further include predetermined reports.
56. The system of claim 52 wherein the reports further comprise a plurality of fields, each of the fields having a corresponding performance range.
- 5 57. The system of claim 52 wherein the predetermined list of recommended actions further comprises a classification of the subject under test, and an enumeration of the predetermined ranges.
58. The system of claim 52 wherein the mapping is performed via a matrix comprising a classification of the subject under test, an enumeration of the
10 predetermined ranges, and a score correlating the predetermined ranges to the ranking.
59. The system of claim 52 wherein the feedback coupling is further operable to reinstate the collecting and gathering of transactional data in an iterative manner.
- 15 60. A method for improving productivity comprising:
collecting performance data corresponding to at least one employee;
analyzing the performance data to determine a ranking of performance,
the performance data indicative of revenue generation and skill proficiency of
each of the at least one employee;
20 defining a set a predetermined actions directed at improving the skill
proficiency and revenue generation;
correlating the ranking with the list of predetermined actions, the
predetermined actions directed to improving qualitative performance;

implementing, based on the correlating, at least one of the predetermined actions; and

measuring a performance improvement resulting from the implementing of the predetermined actions.

5 61. The method of claim 60 wherein measuring further comprises repeating the collecting and analyzing.

62. The method of claim 60 further comprising iterating through the collecting, analyzing, correlating, and implementing, and tracking the results over time.

63. The method of claim 60 further comprising:
10 defining a staffing profile indicative of an optimal combination of employees based on the performance data;
implementing the staffing profile, wherein measuring further comprises measuring revenue generation in response to the implemented staffing profile.

64. A method for assessing, developing and improving the performance and
15 efficiency of an employee comprising:
gathering, via a transactional data interface, transactional data indicative of the revenue generating performance of at least one employee;
aggregating and storing, via a data store, the transactional data;
generating, via an analysis engine, quantitative reports indicative of
20 aggregate revenue generating performance;
determining, based on the quantitative reports and a performance range, a performance ranking corresponding to each employee;
identifying, via a hypothesizer, areas for improvement for each employee based on the performance ranking;

mapping, via a qualitative mapping engine, the identified areas for improvement into a predetermined list of recommended actions, the recommended actions for improving proficiency of skills;

implementing, via a learning center, the mapped recommended actions;

5 and

measuring, via gathering performance factors, the effect of the recommended actions on the revenue generating performance of the employees.

65. The method of claim 64 wherein the transactional data further comprises sales data, educational data, and customer flow data.

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66. The method of claim 65 wherein the sales data includes data indicative of least one of sales per hour (SPH), dollars per transaction (DPT), units per transaction (UPT), transactions per hour (TPH), and traffic conversion percentage.

67. The method of claim 64 wherein the qualitative mapping engine further comprises a predetermined correlation of a type of employee, the performance ranking and the recommended actions.

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68. The method of claim 67 wherein the predetermined correlation corresponds to a matrix.

69. The method of claim 64 further comprising:

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defining a staffing profile indicative of an optimal combination of employee types, based on the performance data, the optimal combination including the skills of each employee; and

implementing the staffing profile, wherein measuring further comprises measuring revenue generation in response to the implemented staffing profile.

70. The method of claim 67 wherein the qualitative mapping engine further comprises a rule-based expert system.
71. The method of claim 64 wherein the learning center further comprises a library of multimedia curriculum.
- 5 72. The method of claim 64 wherein the transaction data is retail sales data.
73. A computer program product having computer program code for measuring and analyzing performance data comprising:
- 10 computer program code for collecting transaction data indicative of performance factors;
- computer program code for analyzing the transaction data to compute an aggregate synopsis of performance of a subject under observation;
- computer program code for hypothesizing the aggregate synopsis to determine at least one of a plurality of recommended actions;
- 15 computer program code for applying the determined recommended actions to the subject under observation; and
- computer program code for measuring a change in the performance of the subject under observation as a result of applying the determined recommended actions.
- 20 74. A computer data signal having program code for measuring and analyzing performance data comprising:
- program code for collecting transaction data indicative of performance factors;
- program code for analyzing the transaction data to compute an aggregate synopsis of performance of a subject under observation;
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program code for hypothesizing the aggregate synopsis to determine at least one of a plurality of recommended actions;

program code for applying the determined recommended actions to the subject under observation; and

5 program code for measuring a change in the performance of the subject under observation as a result of applying the determined recommended actions.

75. A system for analyzing employee and store performance data comprising:

 means for collecting transaction data indicative of performance factors;

10 means for analyzing the transaction data to compute an aggregate synopsis of performance of a subject under observation;

 means for hypothesizing the aggregate synopsis to determine at least one of a plurality of recommended actions;

15 means for applying the determined recommended actions to the subject under observation; and

 means for measuring a change in the performance of the subject under observation as a result of applying the determined recommended actions.